

## SWP Comprehensive Calculator

Mr. A, age 60 years, is planning his financial future and seeks to invest ₹ 50 Lacs in a Hybrid Fund. He anticipates a 9% annual return from the investment. Additionally, Mr. A intends to withdraw 7% of the invested amount annually, with withdrawals to be made on a monthly basis starting from the next month. He seeks guidance on determining the monthly withdrawal amount for the next 15 years and estimating the final value of his investment.

### For Mr. A

Current Age	60 Yrs
Initial Investment	₹ 50,00,000
Monthly SWP Amount	₹ 29,167
SWP Period	15 Years

### Suggested Asset Allocation

Asset Class	Allocation	Assumed Return
Hybrid	100.00 %	9.00 %
Portfolio	100.00 %	9.00 %

### Total Withdrawal

₹ 52,50,000

### End Value

₹ 75,18,788

### Projected Monthly Withdrawal & Fund Value

Age	Monthly SWP Amount	Fund Value at End of Year
61	₹29,167	₹50,85,787
62	₹29,167	₹51,79,295
63	₹29,167	₹52,81,219
64	₹29,167	₹53,92,316
65	₹29,167	₹55,13,411
66	₹29,167	₹56,45,405
67	₹29,167	₹57,89,279
68	₹29,167	₹59,46,101
69	₹29,167	₹61,17,037
70	₹29,167	₹63,03,358
71	₹29,167	₹65,06,447
72	₹29,167	₹67,27,814
73	₹29,167	₹69,69,105
74	₹29,167	₹72,32,111
75	₹29,167	₹75,18,788

\*Mutual Fund investments are subject to market risks, read all scheme related documents carefully.